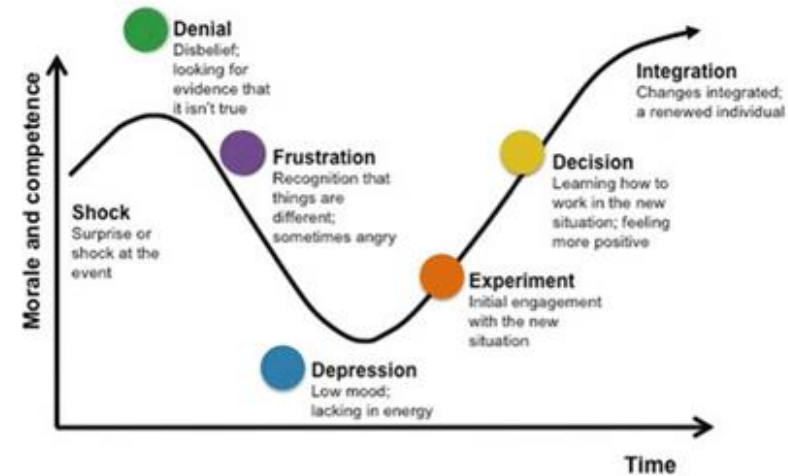# Change Management Consulting for Power BI Implementations

iLink Digital

Change is Stressful

- Anticipatory Stress: anxiety about how the change may affect the individual

- Stages are not linear, and not every user will experience all of them

- A well-structured approach can minimize the impact of this cycle
    - Flattens the curve
    - Shrinks the amount of time to move through the curve

The Kübler-Ross change curve

Morale and competence

Denial
Disbelief;
looking for
evidence that
it isn't true

Shock
Surprise or
shock at the
event

Frustration
Recognition that
things are
different;
sometimes angry

Depression
Low mood;
lacking in energy

Experiment
Initial engagement
with the new
situation

Decision
Learning how to
work in the new
situation; feeling
more positive

Integration
Changes integrated;
a renewed individual

Time

Create Alignment

Maximize Communication

Spark Motivation

Develop Capability

Share Knowledge

Deployment Without Enablement - "Swiss Cheese" Adoption

Without CM:
pockets of adoption

With CM:
all adopt

Lower ROI

History of Failed Changes

Unachieved Improvement

Not What We Expected

Deployment Without Enablement - "Swiss Cheese" Adoption
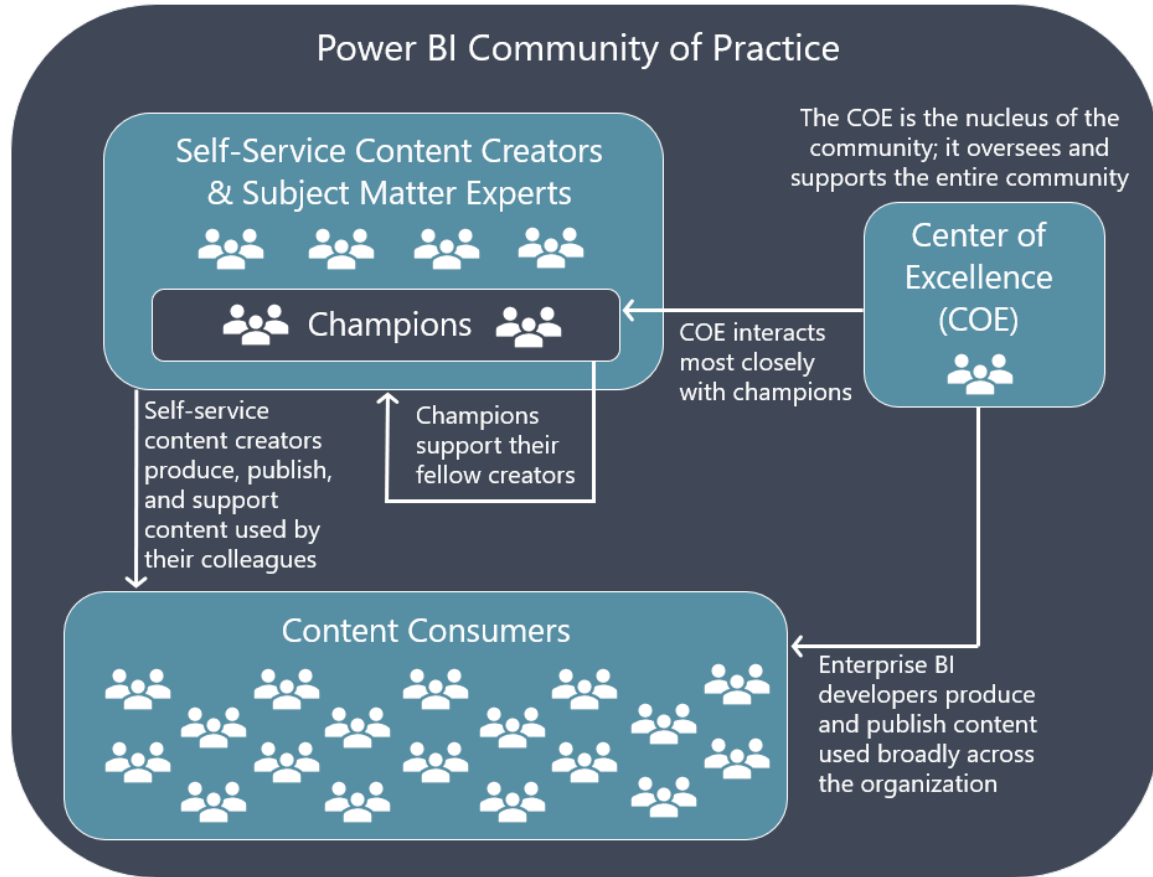
Change Management Research

- According to the Prosci Benchmarking Report, "Initiatives with excellent change management are seven times **more likely to meet objectives** than those with poor change management"
- Projects with excellent change management are 71% more likely to **stay on schedule**, and 81% more likely to **stay on budget**
- Organizations that follow a **structured methodology** are 33% more likely to report good or excellent change management effectiveness than those that don't
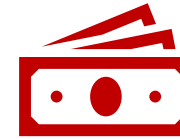
## Benefits of Change Management

- Reduce cost overruns
- Minimize resistance
- Maximize ROI
- Enhance employee engagement
- Increase stakeholder visibility

Community of Practice (CoP) and Center of Excellence (CoE)

Power BI Community of Practice

Self-Service Content Creators & Subject Matter Experts

Champions

The COE is the nucleus of the community; it oversees and supports the entire community

Center of Excellence (CoE)

COE interacts most closely with champions

Self-service content creators produce, publish, and support content used by their colleagues

Champions support their fellow creators

Content Consumers

Enterprise BI developers produce and publish content used broadly across the organization

- Community of Practice (CoP) includes everyone with an interest in Power BI. The CoE is the nucleus of the CoP, but it also includes your change champions, supporters, creators, SMEs, and the business users and content consumers.

- The Center of Excellence helps organizations become more efficient and effective by creating templates, establishing a governance framework, sharing best practices, and driving consumer adoption of Power BI.

- We provide:
  - Customized playbook: weekly trainings for key stakeholders – a playbook to implement a CoE and establishing a strong CoP
  - Consulting on addressing challenges and increasing participation
  - Communication content
  - Presentation materials for initial meetings
  - Enable communications channels and content sharing approaches

Additional Areas of Support
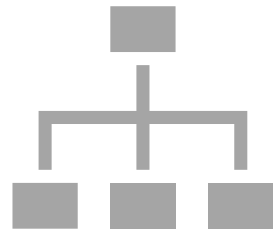
OCM Practitioner as a member of project team

Attends daily stand-ups and advises on end-user impacts and project changes

Design and oversight of Pilot and user testing

Provide adoption updates to stakeholders

Communication content creation

Email drafts

Slides and scripts for townhalls & meetings

Intranet postings and internal social media posts

1-pagers

Blogs

Organizational Change Management (OCM) & End User Adoption

A Fortune 1000 food services company wanted to migrate existing operations and employee training reports from MicroStrategy to Power BI.

Situation

The project scope largely focused on the **migration of user dashboards**; however, they needed support in driving effective end-user change across retail locations.

Challenges included providing a change management strategy that could be deployed across myriad retail locations, owners, operations, and end-users, including single store operations to regional operations. End-users were mostly franchisees who were unfamiliar with Power BI's features and functionality.

The process would introduce a new mobile reporting access and the login experience was going to be challenging. There was a **significant risk factor that the new reporting method would cause work delivery issues and impede rhythm of business**.

Solution

- Engaged with stakeholders to understand concerns and the existing environment to **develop an effective change management plan and approach**.

- **Strong communication** to enable the support desk team to respond to increase volume of support requests.

- Provided clear project deliverables leading up to go-live – including PoC structure, support, and feedback gathering.

- **Cross-organization collaboration** for OCM activities, including HR, IT, Communications, Operations, and Franchising teams.

- Created dashboard aids to provide a business level breakdown of data and background.

"iLink helped make this **transition as seamless as possible** and, most importantly, **helped minimize issues that would affect the field and the Help Desk** with your job-aids and communications." - Learning Technology Lead

Business Impact & Results

✔ **Help Desk support ticket traffic was significant less than expected** due to the successful delivery of the Power BI end user training aids.

✔ Drove over **27000 page views within first 30 days** of deployment

What's Next?

What we provide

- Dedicated Change Management Professional to serve as a member of the project team

- Support as outlined in preceding slides

- Up to 350 hours of support over up to 6 months (additional hours or project duration available at additional cost)

How to get started

- Contact us at ( ) for more information